

EXHIBIT F



FACT SHEET

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How to Optimize Patient Portals for Patient Engagement and Meet Meaningful Use Requirements

You will have better success meeting meaningful use requirements for stage 2 if you integrate a patient portal effectively in your practice operations. In addition, stage 3 requirements may require that you use a patient portal to attest successfully.

Just making a portal available to patients will not ensure that they will use it. The portal must be engaging and user-friendly, and must support patient-centered outcomes. The portal also must be integrated into clinical encounters so the care team uses it to convey information, communicate with patients, and support self-care and decision-making as indicated.

Practices have used their portals to successfully serve a wide range of patients, including those who are older, have lower incomes, or are chronically ill. Patients are likely to use a portal when it is recommended by their providers and has functionality that supports patient activation. Portal training and technical support also will help patients to make the most of its tools and services.

Actions to Take to Make Sure Your Portal Engages Patients

You should understand the elements of an effective portal program and apply them to the specific needs of your practice. As described in more detail in this document, recommended actions include:

1. Learn the benefits of patient portals for patients and providers.
2. Understand how a patient portal helps achieve meaningful use requirements.
3. Implement proactive, engaging portal features.
4. Implement the portal with a systematic process.
5. Actively promote and facilitate portal use.

Learn the Benefits of Patient Portals

Fears and other negative attitudes about patient portals are often dispelled when providers gain experience with a portal and see its benefits for their patients and their practice. Providers who have used portals successfully recognize positive effects, including:

- Improved patient activation
- More efficient and effective communication
- Better and more timely self-care among patients
- Ability to focus better on high-priority patients
- Improved patient satisfaction

CONSIDER: Besides learning the general benefits of patient portals, make sure you and your staff know about all the features in the portal you offer patients so you can explain them.

Understand the Link between your Patient Portal and Meaningful Use

Effective implementation of a patient portal will help you attest to several patient and family engagement requirements of stage 2 meaningful use:

- Clinical summaries
- Patient-specific education resources
- Secure electronic messaging
- Timely access to health information
- Reminders for preventive and follow-up care

The patient portal also has great potential for meeting emerging requirements in stage 3 meaningful use that are expected to focus on self-management and shared management of health care. A patient portal can be used to assist in self-management tasks, through tools for interactive

monitoring and coaching. A portal also can enable patients to collect data about their health and treatment, and to share that data with their providers.

Implement Portal Features that Support Engagement

A patient portal that mostly provides administrative functions, such as scheduling appointments and getting lab results, will not be as interesting or useful to patients. Patients will be more likely to use a portal that is designed and configured to address their personal interests and needs.

CONSIDER: Patients will have different needs and interests regarding a portal tool, depending on their health conditions and level of activation.

A portal that includes interactive and personalized tools and information will be more relevant to patients' needs. Patients are more likely to register and continue using a portal that has a problem-solving orientation, interactive decision tools, and personalized messages and tools.

Implement Your Portal Systematically

You should take into account your practice's resources, culture, and priorities when planning the launch and implementation process. This will help build confidence and acceptance of the portal among clinicians, staff, and patients while minimizing disruption in the practice. Federal regional extension centers (RECs) have experience with portal implementation. Ask your local REC to help you plan and launch your patient portal efforts.

Key questions to answer during planning include:

- What are the goals for the portal in terms of potential benefits for patients and the practice?
- Which features and services should be offered?

- Should they be offered all at once, or phased in?
- Will the portal be open initially to all interested patients, or to a select group during early deployment?
- How will you handle marketing, enrollment, training, and support for patients' use of the portal?

When rolling out your patient portal, you can use several strategies:

- Provider-Controlled
 - Begin with a smaller number of patients and interested providers.
 - Achieve a base of experience and comfort with the patient portal before expanding.
- Team-Focused
 - Include patients on the rollout team.
 - Allow several months to assess how to integrate the portal.
 - Gather patient and provider feedback to plan expanded implementation.
- Efficiency-Driven
 - Make enrollment open to all patients.
 - Have staff manage portal workflow and communication before engaging providers directly.
 - Aim to establish efficient workflows and policies, and avoid burdening providers with troubleshooting during initial rollout.

Promote and Facilitate Portal Use

The whole staff should be involved in promoting the patient portal. The front office can display signs or posters, staff can distribute information brochures, and providers can include standard talking points to introduce the portal during patient visits.

CONSIDER: Patients are more likely to adopt and use a patient portal if their providers recommend and support portal use.

To simplify the portal registration process, have staff assist patients with the process, and consider providing a registration kiosk in the office. Staff can educate patients about how to use the portal's features, and can offer guidance about the kinds of communication that are appropriate between providers and patients.